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Television Business International



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EDITOR'S NOTE

JESSE WHITTOCK



There was a time when the European summer was considered a quiet period for international television. That sure isn't the case any more.

This latest issue of TBI will be heading to events in all quarters of the continent, from Hungary to France to Spain and the UK, in coming months. It's a surefire sign that the market is expanding and yet more evidence that distribution never sleeps.

Accordingly, we've caught up with many of the major sales companies heading to NATPE Europe in Budapest to discover the latest buying trends ahead of the market, which has doubled down on its reputation as a haven for local buyers and global sellers.

June is also the time when the factual world descends on the picturesque French port town of La Rochelle for Sunny Side of the Doc.

We check out the best new projects in the documentary space in our Hot Picks feature, discovering everything from one-offs investigating the death of Princess Diana 20 years ago to a quarter-hour VR experience highlighting the plight of the indigenous Munduruku people of the Brazilian Amazon.

Over in northern Spain, the Galician capital of Santiago de Compostela is hosting the international drama community for the first time at the inaugural Conecta Fiction event.

We've seen Spanish scripted turn from a free TV-dominated space to the latest European drama SVOD hotspot, with HBO, Telefonica and

Netflix all throwing big cash sums at producers, driving up production values and expectations.

Our report on the Iberian scripted market also looks at Spain's western neighbour, Portugal – could Lisbon soon match London, Berlin and Madrid in the high-end drama stakes?

In fact, we head to the UK's capital for our focus on Atrium, Howard Stringer's new drama club. The former Sony boss and DRG CEO Jeremy Fox believe they've found a new way to guarantee finance and distribution of increasingly expensive scripted series with their new project. Read on to find out more.

Rounding off this busy period, the Edinburgh International Television Festival has become a major fixture on the calendar of global execs.

You weren't planning a lazy summer, were you?

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Drama at the members' club



Jorgen Madsen Lindemann, Jeremy Fox, Howard Stringer & Jakob Mejlhede Andersen

Howard Stringer and Jeremy Fox tell TBI about Atrium, their new club for platforms that want to source their own high-end drama series

Howard Stringer is known, among other things, for running Sony, producing for CBS, and until recently, being a non-exec director of UK pubcaster the BBC. His new venture is a first-of-its-kind members club for a select group of international buyers who will finance and transmit high-end drama.

The idea that the whole is greater than the sum of the parts is key to the initiative, which is titled Atrium, and this principle could and should see it deliver several top tier dramas. Stringer will be chairman, with Jeremy Fox of UK-based distributor DRG also behind the ambitious plan.

For Stringer, the appeal is getting back to what he enjoys in TV land. "Jeremy has lured me back to this business – it is 'back to the future'," he says. "That's a good thing because I have spent a long time in management,

where you drift further and further away from the things that you love. I'm not going to be writing these shows, but at least I'm back in the creative element."

Fox says the idea for Atrium came about after speaking to execs such as Jakob Mejlhede Andersen at Viaplay, the streaming service run by DRG-owner MTG, about the challenge of getting the best high-end drama.

"I drew a map of the world on a napkin and noticed that all of these regional OTT services don't conflict with each other," he says. "They are regionally bound, and they all have the same problem.

"[MTG boss] Jorgen Madsen Lindemann told me to prove it, so I went around the world and met all of these telcos – some were well established, others hadn't started [TV] yet, and others were going bust – and they all wanted to know how to get the best content. They talked a lot about what the studios were offering, which

was bulk deals, but they wanted to know how they could get that one breakout hit."

What the world tour yielded in practice is Atrium, which will be a limited membership group that will jointly fund big-ticket drama that can play on each of the partners' services in their own territories.

DRG will take international rights and sell content into any countries not covered by the partners, and across any secondary windows.

There will be one member per region and admission will be "very, very selective", Fox says. Partners will be announced before MIPCOM and membership comes with a commitment to get involved in projects.

The level of that involvement depends on the level of membership. At the entry level, members license the shows coming from Atrium and take them in their territory for three years. Longer, wider windows and/or regional exclusivity can be bought for an



Saigon

enhanced license fee, which will prove useful if they have, for example, free and pay TV operations, as in the case of MTG.

The next level up guarantees some back end in return for greater investment, typically three times more than for a straight license fee. The very top-end membership, meanwhile, guarantees all of those privileges and a possible option to buy into Atrium in the future.

Stringer, who was behind *The Da Vinci Code*'s adaptation from book to big screen, clearly relishes taking a creative role at Atrium.

"Producing the CBS evening news and all of its documentaries was the most fun I ever had," he says. "Then I suddenly woke up as the man in charge. When you are a senior executive at a company you can't crush the ideas of everyone beneath without messing up relationships."

And the next big thing in TV drama? Atrium hopes to find it. "Superheroes will run out of gas and we'll go in another direction," Stringer says. "There's a lot of competition but there's no reason we can't find the next trend." **TBI**

INSIDE ATRIUM

Atrium has three shows on its initial slate: *Fandorin*, *The Eagle Has Landed* and *Saigon*. Stringer has a personal connection to all three.

Fandorin is the project furthest along and will be produced by BBC Studios, the newly commercial production arm of the BBC. It is an adaptation of Boris Akunin's 25-million-selling book series, set in 19th-century Russia and following the eponymous sleuth, who is often described as the 'Russian Sherlock Holmes'. Simon Ashford (*The Musketeers*) is penning the script.


The Eagle Has Landed is slated for a 2019 launch to coincide with the 50th anniversary of man's landing on the moon. Stephen Kronish (24) will write the series, while *Saigon* is an adaptation of the Anthony Grey novel. Over 50 years, it will recount Vietnam's history; from French colonial rule to the last helicopter escaping from the roof of the American embassy in 1975.

Stringer says each of the projects resonated with his own experiences and interests, noting he has been "intimately involved with" each.

"My very first job was to prep the questions for Walter Kronkite when he interviewed Lyndon B. Johnson following his resignation, so I knew quite a lot about Vietnam both historically, and practically from being there". (He served as a military policeman in Saigon during the war.)

Stringer also owns the first editions of the *Fandorin* stories, and has a personal connection to the moon landings. "I spent 36 hours in the NASA control room as a researcher and had been down to Cape Kennedy, where they interviewed the astronauts, so that was dear to my heart," he explains.

Added together, the elements convinced him to join the Atrium project. He recalls: "There's no such thing as a coincidence, so I said sign me up."



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Captive audience: the Spanish SVOD boom

Spain's drama production sector is moving swiftly towards international television's top tier, fuelled by the SVOD global boom. Emiliano de Pablos reports

Not so long ago, Spain's TV drama production sector was completely driven by free-to-air TV broadcasters Mediaset España, Atresmedia and state-owned TVE. However, weighty new players, led by telco giant Telefonica's pay TV player Movistar+, have emerged and shaken things up over the past two years.

Having announced an unprecedented €70 million (US\$80 million) annual investment in original series production, Movistar+ aims to release its first four premium dramas between October and December, and a further ten next year. These will more than double the average budget of a Spanish TV series.

The impact of Movistar+ dramas on the international market has been immediate. The pay TV operator has sold distribution rights to its most-anticipated series to three of Europe's foremost TV sales companies: UK-based Sky Vision has taken Alberto Rodríguez's Seville-set historical thriller *The Plague*; Germany's Beta Film is selling Jorge Sánchez-Cabezudo's eco-thriller *The Zone* and Bambú Producciones' melodrama *Velvet Collection*, the sequel of Atresmedia smash hit *Velvet*; and French company About Premium Content has nabbed Enrique Urbizu's family drama *Giants*.

"We are very happy with these distribution deals, closed at the script stage, with the backing of the talent attached to each project," says

Domingo Corral, director of original production at Movistar+. "I think it is a good start."

Movistar+ maintains first options on its TV drama rights in Latin American territories where Telefonica operates pay TV services, including Central America, Colombia, Peru, Chile and Brazil.

The pay TV player has made an indelible mark on Spanish TV, but in the race to dominate local premium drama, it was Netflix that struck first, releasing its first original drama in Spain, *Las Chicas del Cable* (*Cable Girls*) on April 28. Produced by Madrid-based Bambú, the series launched to Netflix's 100 million subscribers in 190 countries.

"The only results we know are related to



La Casa del Papel

the activity *Cable Girls* generates on social networks,” says Bambú co-founder Ramón Campos of the show’s performance. “We are very pleased with both the social network noise and Netflix’s promotion of the series.”

The 1920s Madrid-set melodrama follows four young girls working as switchboard operators at Spain’s first nationwide telecoms company. It targets female audiences, in line with previous Bambú free-to-air TV primetime hits such as *Velvet*.

Netflix had reportedly shown interest in a *Velvet*-style fiction because of the drama’s strong showing in Latin America before the *Cable Girls* commission. Another aim of the order was to drive more adult audiences to Netflix in Spain.



Las Chicas del Cable

A second season is scheduled for December, and Netflix has already greenlit production for a third, which is planned to launch in 2018.

HBO España, another OTT service, began operations in November last year, tapping seasoned Spanish television executive Miguel Salvat to head its original TV series production.

It will be a long-game play. “It could take two years to produce a first HBO series in Spain,” said HBO Europe CEO Hervé Payan at a mid-December HBO España presentation in Madrid.

For the moment, HBO España is meeting with Spanish producers, filtering through various projects but so far choosing not to develop any, according to Salvat.

“We want a clearly differentiated product; daring, passionate, with an authorial voice, set in Spain, shot in Spain with Spanish talent, and taking into account that our series will also be launched on the other services HBO operates in Europe,” he says.

All in all, this means more Spanish producers gaining commissions for their original drama ideas, with HBO’s model being along the lines of those applied to date by Movistar+ for scripted projects. Both players also emphasise the importance of development investment for premium TV fiction production.

At April’s Series Mania, Movistar+ signed a deal with Spanish production company Portocabo to develop thriller TV series *Hierro*, the best project award winner at Berlinale’s 2015 CoPro Series (see TBI Scripted #1), with Lagardère Studios-backed Atlantique Productions and Arte France also attached.

Telefonica’s pay TV service has also signed a deal with Conecta Fiction, the new Spain-based TV coproduction and networking forum, to develop one of the ten drama or miniseries projects selected for a pitch competition at the Santiago de Compostela event.

Public broadcaster TVE has also committed to the same initiative. Spain’s free-to-air TV players have successfully bet on local TV dramas with high production standards over the years, helping to define and refine audiences’ tastes.

However, as TV consumption moves towards the VOD market, ratings of new primetime TV dramas seem, in general, less robust than in the past, generating smaller returns for networks’ investments. Though widely sold on the international market, Mediaset España series *I Know Who You Are* and Atresmedia’s *Lifeline*, both new auteur thrillers, averaged 15% and 13% audience shares respectively, results far lower than those of more established series such as Plano a Plano-produced *Down Below*, whose third season topped Atresmedia-owned Antena 3’s primetime ratings with a standout 19.7% share.

“We need to support different ways of telling stories, but don’t forget that part of our work, when it comes to telling them, is reaching the audience,” says producer María Cervera at Plano a Plano.

“We are more demanding of high quality standards that call for bigger investment. To fill the gap, we are forced to look for new financing strategies,” she adds.

Thus, financial structures plotted for a growing number of new local TV drama projects now take into consideration coproductions, pre-sales and distribution alliances.

“TV fiction production is evolving,” says Alfonso Blanco of Portocabo. “On the one hand, there will continue to be local market-oriented series productions, with tighter budgets. On the other, there will be high-budget dramas that need to look to the international market for further financing.”

“Spanish TV series production is undergoing a change of financing models,” adds Javier Méndez, head of content at Mediapro, coproducer on HBO’s Paolo Sorrentino-directed *The Young Pope* and its spiritual sequel, *The New Pope*.

The small-to-medium size of the Spanish TV market has made Mediapro look for production partnerships abroad. By bringing on board *Homeland*-producer Ran Telem as head of international development and buying a significant stake in Daniel Burman’s prodco, Oficina Burman, the firm has multiplied its presence in international high-end TV drama projects since last year.

With Oficina Burman starting production on Edha, Netflix’s first original series in Argentina, Mediapro also plans to roll Mediterranean noir *The Paradise*, co-developed by Telem with Finnish broadcaster YLE, by next fall.

For the English-language survival-thriller project *The Head*, presented at Series Mania, Mediapro has teamed with Patrick Nebout’s Sweden-based production company Dramacorp, which is a joint venture with Beta Film. Also in development is *El Fútbol No es Así* (*Football is Not Like This*), an adaptation of a crime novel set in the Spanish football world, in partnership with DirecTV Latin America.

“Somehow, independent cinema’s traditional financing model, based on pre-sales, is being transferred to TV fiction,” says Méndez. “More and more TV producers are ready to assume risks, while TV channels are increasingly interested in stories coming from other countries. I think it is working.”

“In fact, we are already working on models where TV networks no longer bring the full financing to the table, and we assume part of the risk, because we are very confident about the international sales of our series.”

In the search of more financing resources, Netflix is becoming a significant partner for Spanish TV drama producers.



The streaming giant has pre-bought the third season of Onza Entertainment-produced *El Ministerio del Tiempo* (*The Department of Time*), with 13 episodes airing on pubcaster TVE’s La 1 from June 1 before joining the Netflix offer.

“We are more and more compelled to coproduce, because our TV dramas are demanding bigger budgets,” says Fernando López Puig, TVE’s drama director.

“Netflix has provided more resources for these series, facilitating episodes with higher production quality,” adds Gonzalo Sagardía at Onza Entertainment.

Accordingly, *The Department of Time*’s third season shot in locations on the Mediterranean coast, luring bigger caché actors, and more resources were invested in special effects, key for a sci-fi period series.

TVE’s bet on higher budget TV drama projects also includes *Hernán Cortés*, which is about the life of the titular 16th Century Spanish conquistador. It was developed alongside Endemol Shine Spain’s Diagonal TV, US Hispanic broadcaster Telemundo, Mexico’s Televisión Azteca and producer Blueprint.

“The challenge is to create more universal content that don’t seem strange to Spanish audiences,” says the pubcaster’s López Puig.

“There are many things going for Spanish TV production, including language and actors known on both sides of the Atlantic, that will help it become a bridge to the Latin American market.”

Netflix, meanwhile, has extended an already close relationship with DeAPlaneta-controlled broadcaster Atresmedia through adventure TV



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CAN PORTUGAL PUT TELENOVELAS ON THE SHELF?

Portuguese TV drama production has traditionally focused on telenovelas, which is easily the most popular scripted TV genre in the country.

Though in-demand abroad and appreciated by buyers as a cost-effective product, Portuguese telenovelas facing strong competition on the international market from Latin American and Turkish productions. Some territories are even importing long-running Indian dramas.

The format continues to work at home, however. In May, *Ouro Verde (Green Gold)* and *A Impostora (The Impostor)*, both produced by Plural Entertainment and for Media Capital's TVI, and SIC's *Amor Maior (Greater Love)* and *Espelho de Agua (Water Mirror)*, from SP Televisao, dominated the monthly free-to-air TV ratings.

Debate over the future is arising, however. Recently, pubcaster RTP urged Portuguese independent producers to raise the bar on TV drama by increasing the volume of production and boarding shorter-format series.

"We produce a lot of telenovelas – and we are very good at doing so – but now we are starting to produce more miniseries," says Susana Gato at independent TV producers organisation APITV, which is aiming to internationalise the territory's drama output.

Portuguese TV drama budgets are far lower than those in Spain, however. That's understandable given the smaller size of the local TV market: TV advertising investment last year was around €420 million (US\$472 million), about a fifth of Spain's €2.1 billion.

Happily, connections between the Iberian territories are growing. Religious miniseries *O Milagre de Fátima/El Milagro de Fátima (The Miracle of Fatima)*, a coproduction by TVI with Juan Baena's Coral Europa, "has reached international markets where Portuguese TV dramas never had been sold before," says to Gonzalo Sagardía at Onza, which handles *The Miracle's* overseas rights.

Elsewhere, RTP and Vocento-controlled Veralia have produced a Portuguese adaptation of Spanish pubcaster TVE's time-travel series *The Department of Time*, and RTP has already greenlit a second season.

Another example is *Vidago Palace*, a 1930s-set RTP drama coproduced with Galicia's regional pubcaster TVG and La Coruña-based Portocabo, whose co-founder, Alfonso Blanco, says financing remains the biggest challenge. "Portuguese broadcasters have no other way out than to coproduce," says Blanco.

APITV's Gato sees an answer in the international market. "If we want to be relevant, we need to have great fiction to export," she says.

drama *La Catedral del Mar (Cathedral of the Sea)*, which based on Ildefonso Falcones' best-selling book of the same name, and coproduced with Diagonal. The streamer and Antena 3's parent first worked together two years ago, when the US company acquired SVOD rights to a package of Atresmedia series.

Following the December 2014 launch of TV drama channel Atreseries, Atresmedia is consolidating its Series Atresmedia brand in order to further international business around the broadcaster's scripted dramas.

Diagonal, whose credits include TVE's historical series *Isabel*, is also developing Barcelona-set thriller series *The Barcelona Connection* alongside UK-based Nevision, which owns distributor About Premium Content.

Studiocanal-backed Bambú, meanwhile, has a long-term pact with Atresmedia for primetime series, and this has generated standout successes such as *Grand Hotel* and *Velvet*.

For Atresmedia, Bambú is producing two real-life inspired TV series: historical war TV drama *Love in Times of War* and Galicia-set drug trade series *Fariña: Snow on the Atlantic*. Beta Film has teamed as coproducer and international distributor on both, just as it did with *Grand Hotel* and *Velvet*.

After experimenting with English-language production through 2014 BBC Worldwide coproduced drama *The Refugees*, Bambú's focus is firmly back on purely local projects.

"We think our first market should be the Spanish market and for that we must produce in Spanish," says Ramón Campos, who has recently inked a two-series development deal with giant Televisa in Mexico.

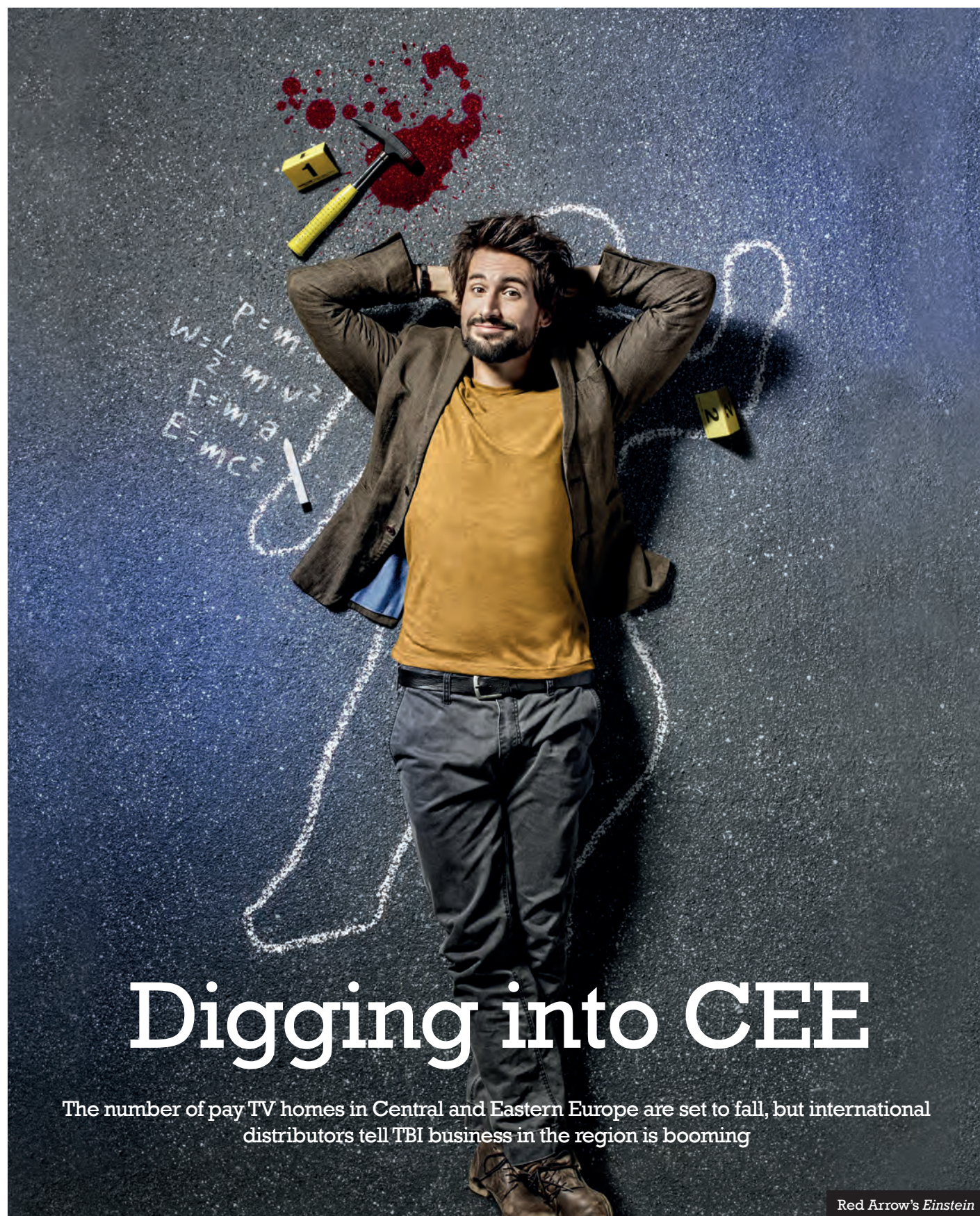
"Spanish TV dramas are increasingly selling better abroad because they are better made and audiences around the world connect with them," says HBO España's Salvat. "Not all the Spanish series work well abroad, but many more are working much better than before."

"Spain is keeping up with every other country in terms of TV fiction production and talent," says Mediapro's Méndez. "There is still a long way to go, but we must trust in our productions on the international market a little bit more."

Since coproduction has become almost inevitable when undertaking ambitious, big budget TV projects, the pioneering Conecta Fiction event, aimed at connecting Europe with Latin America and the US Hispanic market, looks to be landing at the right time for the growing Spanish drama market. **S**



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Digging into CEE

The number of pay TV homes in Central and Eastern Europe are set to fall, but international distributors tell TBI business in the region is booming

Red Arrow's *Einstein*

A Digital TV Research report earlier this year forecast the number of pay television homes in Central and Eastern Europe to fall in 18 territories across the region in the years between 2016 and 2022 – decreasing total TV homes by almost two million and pay TV subscribers by one million.

However, according to various international distributors, the programme distribution business in the CEE has rarely looked brighter.

Free-to-air DTT platforms and the acquisitive channels they house are replacing outmoded analogue pay TV platforms (2017 is expected to be the peak year for paid-for television in the region), and digital pay services are increasingly present, if less desirable to consumers.

“There was a big boom two years ago, especially in Poland when DTT started, and people began to really pick stuff up,” says Red Arrow International’s senior VP of global sales, Bo Stehmeier.

The (limited) impact of SVOD

The past two years has also seen Netflix and Amazon Prime Video both launch across the CEE as part of wider global launches – Netflix going international in January 2016 and Amazon following suit in December.

New opportunities mean new buyers, as J.P. Bommel, CEO of trade fair organiser NATPE, notes. “We have got more than 415 buyers coming to NATPE Europe in Budapest, and many of them are new for this market,” he says. Some of these are coming from new markets, “and that’s an exciting development”, he says.

“The global SVOD players are around and have a very focused process here just as everyone else does,” says Keshet International senior sales manager Paula Cohen McHarg. “They’re mainly looking to do global deals, but there are also some local VOD players. I’ve recently done a deal with Croatian SVOD service Pickbox, for example.”

Another Digital TV Research report from December last year predicted there will be 18.19 million paying SVOD subscribers across Eastern Europe by 2021, with Netflix leading the way with 3.5 million, ahead of Russia’s Ivi (2.43 million), Megogo (Russia and Ukraine, 1.32 million), Okka (Russia, 1.08 million) and Ipla (Poland, 900,000). The report was conducted before Amazon revealed its 200-territory

launch and is therefore not included in the analysis – presumably it will have an effect.

In that report, Digital TV Research principal analyst Simon Murray said many Eastern European consumers found Netflix “expensive” and transactionally reliant on credit cards, despite low local ownership.

Others, including ex-AMC Networks channels chief Bruce Tuchman in a previous issue of this magazine, have claimed Netflix needs localising before it can be considered a major player and key customer of distributors working in the region.

While Netflix did go ‘fully local’ in Poland earlier this year, Banijay Rights VP of entertainment Andrew Sime says the big SVOD players are not the key target for distributors, with focused, thematic pay TV channels and broad free TV networks accounting for a bulk of business.

“The local acquisitions people are phenomenal, and they know all about your

FremantleMedia’s CEO of the Nordics, Central and Eastern Europe and the Balkans, Daniela Matei, concurs, saying tried-and-tested, big ticket fare is most in demand.

The Fremantle catalogue is attracting buyers through “major talent shows such as *Got Talent*, *The X Factor* and *Idols*, as they continue to perform and deliver for the broadcasters who license them”, she adds.

While ratings stability is one reason for this, another is purely fiscal. “In recent years, financial pressure is something that has been felt strongly across borders,” says Matei. “This has led to channels using big-brand, established, well-known and well-loved shows to light up their schedules in order to catch the audience’s attention and draw in viewers.”

For Red Arrow, legacy formats such as *Gallileo* remain the golden goose. “It’s in production in six territories, and in many as a daily show,” says Stehmeier.

He notes that there are signs of newer

“Financial pressure has led to channels using established and well-loved shows to light up their schedules”

**Daniela Matei,
FremantleMedia**



slate,” he says. “Meetings are quick because they focus purely on what’s right for their channels.”

“DTT channels are still buying lots of factual,” says Stehmeier. “In Hungary, TV2 is launching DTT channels, which are all about acquisitions. Those channels are very targeted.

“Considering the booms in Hungary and Poland, we’re looking to place our *Catastrophe* series, and classics like *Empire Builders* with broadcasters, and we know localisation is really important to them.”

Quest for classics

Tariffs can be lower than in CEE than elsewhere, and Sime says that contentious formats rarely sell well. “The flip side of loyalty is buyers are cautious against novelty,” he adds. “Formats that could make a splash for the controversy might not immediately work there.”

formats making in-roads.

“*Married at First Sight* was successful there, as the reality market is becoming more mature,” Stehmeier adds. “Finished tape and formats are doing well, creating a mixture of revenues.”

Mature market

‘Mature’ is a word Kabo International managing director Arabelle Pouliot di-Crescenzo also uses to describe the CEE region. “As a general rule, I feel CEE is very similar to dealing with the rest of Europe,” she says. “I don’t sense or use a different approach. It is a mature market full of many tiny but focused countries.”

Kabo is currently shopping studio gameshow *Who’s Who*, in which contestants try to guess the true identities of six strangers, in the region.

Pouliot Di-Crescenzo is not the only one targeting sales in the genre. Keshet’s Cohen



McHarg says gameshow format *Boom!* has made it to season three on TV2 in Hungary, and “is working well across the region”.

“We have also seen gameshows make a return to the spotlight as they are affordable, can be stripped easily across the week and deliver great audience numbers,” says Fremantle’s CEE chief Matei.

However, Cohen McHarg says the “most audible trend in the region is the reboot of the classic big formats” such as reality trail blazer *Survivor*, which poses difficulties for newer formats hitting the market, requiring unconventional launch approaches.

Outside the box

Thinking laterally about how to reduce costs while keeping ratings is one method that distributors can use hit back, says Cohen McHarg. Keshet is talking to CEE broadcasters about using the set of *Who's On Top* for Serbia's

TV Pink for their own versions. “It could be a real opportunity for broadcasters to band together,” she says.

Responding to market trends is key, distributors agree. “Keshet is very willing to work in this region and be flexible in the ways this region needs us to be,” says Cohen McHarg. “Our track record in the past year in the region shows we have really expanded the reach.”

Kabo's Pouliot Di-Crescenzo says bringing

production nous to channels is another way to encourage local formats business.

“It is not the same price point as many European territories, but many buyers appreciate what we can provide – the consultancy, the bible and the collaboration. Some European territories will feel they know how to produce the show without you,” she says.

“Sometimes you can't believe the production budgets, but the programmes certainly don't look bad on screen.”

Formats hailing in the region are a rare phenomenon, especially those co-developed with international production and distribution companies, which usually aim to sell and/or remake library formats with CEE networks, or produce longer-running scripted series.

“CEE is a strong region for us, one of the most important regions for us,” says Sime. “We don't have production companies there apart from Mastiff East in Russia, but we do lots of business there with legacy and classic formats like *Killer Karaoke* and *Fort Boyard*. Tried and tested formats work well, as viewers show a lot of loyalty, so we know people come to the brands.”

“Our focus across CEE and CIS is mainly as a distribution business rather than creative production house,” says Fremantle's Matei. “Our local production offices in Poland and Croatia focus on scripted content – we have an ongoing soap in Poland, and until recently, we had a couple of daily dramas in Croatia – rather than entertainment formats.”

Fremantle formats in the region include gameshow *Family Feud* in the Czech Republic, Slovakia, Romania, Russia and Poland; the wide-selling cookery series *My Mom Cooks Better Than Yours* in Slovakia and Romania; and dating show *Take Me Out* in Serbia. Catalogue titles *Match Game*, *Who Knew*, *Password*, *Hot Streak* and *What's My Line* have all found new homes in the region.

“The CEE region is the same as the rest of Europe. It is a mature market full of small but focused countries”
Arabelle Pouliot Di-Crescenzo,
Kabo International






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A large, busy exhibition floor at IBC 2017. In the foreground, a purple booth displays a '4K Playout' screen showing a soccer game. People are walking through the aisles, and various other booths and displays are visible in the background. The overall atmosphere is one of a major international trade show.

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Banijay has seen *Psychic Challenge* run for 16 seasons in Ukraine and 17 in Russia, while *Wife Swap* has run in some territories for more than 20 seasons.

"Our factual entertainment works less in social experiments and more in the reality space," adds Sime. "TVN in Poland has commissioned *Ladette to Lady*, along with Novy in Ukraine and Friday TV in Russia. That's three versions of a format that is ten years old, and those buyers came to us for the show because they remembered the original."

Scripted formats

Scripted in Central and Eastern Europe is dominated by telenovelas, either locally produced or imported from Latin America and Turkey.

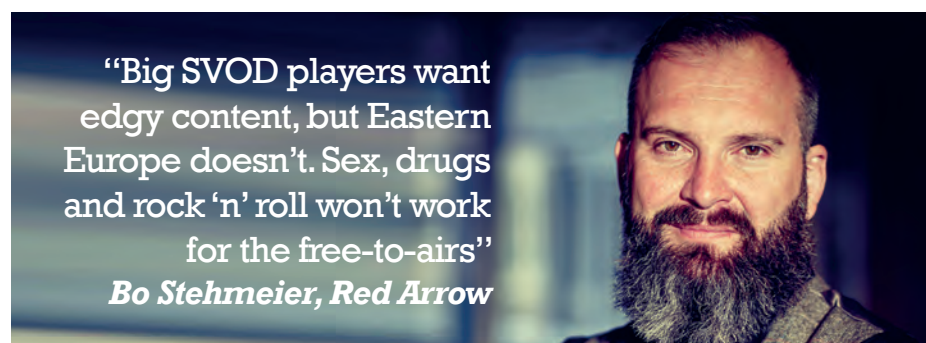
Distributors such as Eccho Rights, Endemol Shine International, Global Agency and Fox Networks Group Content Distribution have all found success in the region with Turkish dramas, while NATPE Europe always has a healthy contingent of sales houses from Latin America on the market floor.

Istanbul's Global Agency, for example, has just sold high-rating new season Star TV drama *Mother*, which comes from MedYapim and MF Yapim, to RTL in Croatia, Sitel in Macedonia, Tele Imedi in Georgia, PRVA in Serbia, BTV in Bulgaria and Antenna in Romania, with deals in Albania, Kosovo, Poland, Kazakhstan, Russia and Ukraine set to close.

Scandinavia's Eccho, meanwhile, recently

shopped Show TV drama *Insider* to LNK in Lithuania, and *Brave and Beautiful* to KTK in Kazakhstan and Koho TV in Kosovo.

International scripted formats are also working in the region, however. Keshet's Cohen-McHarg says a Russian adaptation of Israeli



sitcom *Traffic Light* has clocked up 200 episodes and ten seasons, while TV3 in Lithuania commissioned a 140-episode daily remake.

Kabo's Pouliot Di-Crescenzo notes that the appetite for bigger volume in CEE scripted series means distributors can milk their formats. While a Canadian version of comedy *Cops on the Block* ran to 13 episodes, a Ukrainian remake order for ICTV was for an initial 35.

"I've had success with different genres, but with scripted formats the most," she adds. "Maybe the CEE channels appreciate the volume and the scripts. Plus, they also don't have as much long-term experience in comedy. We do and that's very positive for us."

"We're starting to see the first markets for telemovie remakes, which is interesting," adds Red Arrow's Stehmeier, who notes that high-production value detective series from Germany such as *The Last Cop* and *Einstein*, and English-language movies are also big sellers locally.

However, edgy cable content is rarely welcome. "The culture is similar to Latin America," says Stehmeier. "This is a very religious part of the world, and there are not as many pay TV outlets as elsewhere."

"The big SVOD players are looking for edgier slates, so our development has become edgier, but Eastern Europe finds that content too edgy: drugs, sex, and rock 'n' roll won't work in free-to-air."

For this reason, Red Arrow is looking towards procedurals. "The market is shouting out for them," says Stehmeier. "We are looking at whether we can do coproductions with major Eastern European territories."

The FTA market is changing, however. Influential European broadcaster Modern Times Group is selling its channels assets in territories such as the Baltics and Russia, as it refocuses on digital entertainment.

Pouliot Di-Crescenzo says the ripples of

these deals haven't made it to market floors yet, noting she hasn't "felt anything changing at my end with MTG".

"We have to wait and see how this plays out," says Keshet's Cohen-McHarg. "There have been no major changes on the ground for now, but it is on people's minds."

Whatever happens with MTG and the shrinking pay TV market, international distributors are unanimously positive about prospects in the region.

According to Cohen-McHarg, "It's a better, stronger market than when I first came here – it's more open-minded. People are really keen for quality content". **TBI**

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Buyers Briefing

Two key Central and Eastern European acquisitions executives outline their buying strategies, while NATPE CEO J.P. Bommel outlines what delegates can expect from the upcoming NATPE Europe event in Budapest

Name: Kai Gahler
Title: acquisitions executive,
Kanal 2, Estonia

TBI: What channels do you buy for and how are they different?

We buy for three channels. The biggest is Kanal 2, which is a mainstream commercial TV channel and the most watched TV channel in Estonia. We mostly air local shows in primetime, but there is a need for acquired content in other time zones. We also have two small basic cable channels: Kanal 11 for females and Kanal 12 for males. Their programming relies mostly on acquired content.

TBI: What genre or slot on your schedule is the most difficult to buy for and what is simplest?

The hardest thing is to find primetime-suitable acquired content. The market is full of quality dramas, but they tend to be catered more towards niche audiences. We, on the other hand, need titles with a more broad appeal and it seems that there are not enough titles of that kind available.

Probably one of the easiest areas for us to acquire are Turkish dramas that we air in access prime. As other markets started airing them before us, we can follow their lead and pick the series with the best track record.

TBI: What is your focus at NATPE Europe?

The main focus is to find fresh content that we might miss during a bigger and more hectic market like MIPCOM. Also, as NATPE is cozier, you get to spend more time with other sellers and buyers. This helps to form better relationships and understand each others' needs more clearly.

TBI: Do you mainly shop at the mid- to large-size distributors or are you looking for something else?

We have long business relationships with all kinds of distributors ranging from local mini-companies that sell only one or two titles to huge studios with whom we have bigger packages. The content matters, not the size of the company.

TBI: How good is the content coming out of the CEE? Does this affect how much programming from beyond the region you acquire?



Until now our main focus on the acquisitions side has been content in English, German and, occasionally, the Russian language, and Turkish drama entered our world some years ago.

We have not really tried CEE content, but our first attempt began at the start of this year – we have aired *Burlyve Vino* in a daily daytime slot. This Slovakian romantic drama has a lovely story with matching great production values. So far the ratings have been modest, but it takes time for the viewers to get accustomed to a series from a 'brand new' country. I am positive people will soon get more used to it. In the end, storytelling counts.

TBI: How important is original programming to your audience?

On our main channel the most watched shows are local programmes and almost all of our primetime on Kanal 2 is local. It is the cornerstone of our programming and our viewers clearly value these shows. It does not matter if it is a show, reality or drama – Estonians love Estonian content!

TBI: Did you attend the LA Screenings?

The role of American series has decreased during the past decade, so there is no need for us to attend the LA Screenings. Also, the screeners are available very soon after the event.

Name: Georgi Gachehiladze
Title: general producer of Georgian Public
Broadcaster

TBI: What channels do you buy for?

We acquire programming for the core Georgian Public Broadcaster networks, Channel 1 and Channel 2.

TBI: What windows are you buying for? Do you want on-demand rights?

We buy for free TV with basic cable and free satellite simulcasts, for Channel 1 and Channel 2, and in the Georgian language. We are not interested in on-demand rights.

TBI: What genre or slot on your schedule is hardest to buy for and what is easiest?

That's hard to answer, but nothing is difficult when you know your schedule and have money.

Name: J.P. Bommel
Title: president & CEO, NATPE

J.P. Bommel became leader of US-based industry markets organisation NATPE in August 2015, initially joining as managing director and COO. Following the appointment, he and outgoing chief Rod Perth decided to move NATPE Europe back to Budapest, Hungary, after a two-year switch to Prague in the Czech Republic. Here, he tells TBI about new initiatives for NATPE Europe 2017, and why he has placed more focus than ever on the international buying community

TBI: How are you positioning NATPE Europe to stand out from other, larger international markets?

First of all, I need to say this is shaping up to be the best NATPE Budapest ever. The purpose of the meeting is to be a global event for buyers. We have to make sure those buyers are in attendance.

TBI: June is a busy month for television industry, of course, with NEM running the week before and other markets cropping up.

Lots of markets are taking place at the same time, but these are mainly for producers and similar types of companies. While we do place some focus on producers, this is all about buyers and sellers.

TBI: How many buyers do you expect through the doors?

We have more than 415 confirmed to date, and many of them are new for this market.

TBI: What new initiatives do you have lined up for 2017?

We have created a concierge service that helps buyers and sellers get together. This will help connect people who might otherwise have a



hard time connecting.

There is also a priority to honour buyers, and show them we really take care of them. It is important to celebrate and to honour creativity.

TBI: Last year, you addressed the issue of non-affiliated screenings occurring around the market by launching a venture with the studios. What can delegates expect this year?

We have to make sure we bring them fresh content, and we can do that by making sure the studios come and do their screenings here in Budapest.

Some buyers don't have the finances to go to the LA Screenings, so this is an opportunity to see that fresh content. CBS Studios, Lionsgate Television, Warner Bros., NBCUniversal International Distribution, CBS Studios International, Fox and MGM are signed up.

TBI: What other territories are you shining a light on at the event?

We want to position the event as working for local companies, so content from the region is showcased properly, and for international companies. We will be showcasing content from the CEE and have spotlights on Turkey and China among others, with the likes of Kanal D and Jiangsu showing off their fresh shows.

TBI: Finally, you're opening the event with a pair of panels on Monday afternoon (June 19), before the market kicks off the following morning. What is the thinking behind this?

We will have an opening session on windowing content in the Central and Eastern Europe region, and the following session is research-based. The first is all about the opportunities springing up on new platforms.

We will have a great and experienced panel from across the region [Studiocanal sales chief Katrina Neylon, analyst Jack Davison from 3Vision, Sony's Central Europe channel chief John Rossiter, RTL Hungary content head Tibor Forizs and Antenna Group's Pete Smith], debating how you window your programmes. **TBI**

TBI: What is your focus at NATPE Europe?

For the moment, we are looking for TV [drama] series, entertainment formats and documentaries.

TBI: Do you mainly shop at the mid- to large-size distributors or are you looking for something else?

We usually go to the larger-size distributors.

TBI: How good is the content coming out of the CEE? Does this affect how much programming from beyond the region you acquire?

We do not buy much CEE content.

TBI: How important is original programming to your audience?

It's very important, and always draws the highest ratings.

TBI: Do you attend the LA Screenings, and if so, what were you looking for?

Usually I do attend, and I look for movies and US series.



Factual Hot Picks

A full-page background image showing an astronaut in a white spacesuit working on the exterior of the International Space Station. The astronaut is in the foreground, with the station's complex structure and solar panels visible in the background against the blackness of space.

THE SHOW: *America's Secret Space Heroes / Engineering Space*
THE PRODUCER: Arrow Media
THE DISTRIBUTOR: TCB Media Rights, Off the Fence (Americas)
THE BROADCASTER: Smithsonian Channel (US)
THE CONCEPT: Under the bonnet investigation of great engineering achievements in US space exploration

Across six one-hour episodes, *America's Secret Space Heroes* tells the stories of the last surviving engineers behind some of the most spectacular achievements in space exploration.

The episodes include the experiences of engineers who were challenged to create the world's first reusable space vehicle, the Space Shuttle; the workers who paved the way for the most complex structure ever built in space,

the International Space Station; and the inside story of the instrument that nearly broke NASA, the Hubble Space Telescope.

Each episode weaves together archive film with dramatic reconstruction and intimate, emotional interviews from the astronauts and the engineers who ultimately held their lives in their hands.

The series is being distributed in most

international markets by TCB Media Rights as *Engineering Space*. Off the Fence has rights to distribute the series across the Americas.

TCB's sales executive for Benelux, Central and Eastern Europe, and the Middle East and North Africa, Holly Cowdery, says the series has already been picked up in France and Germany. "This is a great series that combines do-or-die jeopardy with serious engineering," she says.



THE SHOW: *Grayson Perry: Divided Britain*
THE PRODUCER: Swan Films
THE DISTRIBUTOR: All3Media International
THE BROADCASTER: Channel 4 (UK)
CONCEPT: Eccentric artist investigates the Brexit referendum

Transvestite artist Grayson Perry first came to attention in 2003 when he won the prestigious Turner Prize. More recently he has carved out an interesting niche as a social commentator, through Channel 4 television series such as *Grayson Perry: All Man*.

Now Perry is back on TV with *Grayson Perry: Divided Britain*, a one-off special about what he calls 'the most divisive issue of my lifetime': Brexit. Against the backdrop of the UK's snap election, Perry attempts to uncover the emotions, beliefs and desires that have driven people to one Brexit tribe or another, and then attempt to capture what he's found in a new piece of art work.

Joe Evans, managing director of producer Swan Films, says: "The Brexit vote in Britain – echoed in the election of Trump, and the presidential contest in France – revealed a much broader 'culture war' opening up in Western society between two tribes. With his unique artist's eye, Grayson Perry is able to reveal the truth about this social rift that the daily noise of news and politics obscures."

All3Media International executive VP Rachel Glaister says: "Grayson Perry comes across as a likeable 'everyman expert' in his shows. Australia, Canada, New Zealand and Hong Kong are keen on his shows, while Scandinavia has also started to test the water with his popular arts approach, as have Russia and the CIS, where the artist in society is seen more in mainstream entertainment."

THE SHOW: *Age of the Builders – Notre-Dame*
THE PRODUCER: Programme 33
THE DISTRIBUTOR: Arte Sales
THE BROADCASTER: France 2
THE CONCEPT: Animation/documentary hybrid that explores Paris' iconic Notre-Dame

Age of the Builders – Notre-Dame is a primetime event documentary that tells the history of one of Paris' most iconic sights – the cathedral of Notre-Dame. Unusually, the production is a combination of 3D animation and documentary.

A fictional tale, entirely animated, will act as the backbone of the film, around which documentary scenes will be built to provide specific historic and technical explanations. Arte Distribution head of sales Celine

Payot Lehmann says: "The film is a constant dialogue between animated 3D fiction and real live-action footage.

"It's the balance between these visual experiences that give the film its depth, interest and epic dimension, in the articulation between the intensity of the fiction and scientific rigour of the documentary," she adds.

The production has a €4 million (US\$4.5 million) budget and has secured pre-sales in markets including Italy, Spain, Canada, China and South Korea.

"This unprecedented form of animated docudrama has two strengths," says Payot Lehmann. "First, the animation revives a world for which there is no filmed testimony. Secondly, it's interesting for story-telling purposes: this form of docu-drama enables us to tell a vivid story with strong characters."





THE SHOW: *Diana: The Truth Behind Her Death*
THE PRODUCER: Tony Comiti Productions
THE DISTRIBUTOR: Banijay Rights
THE BROADCASTER: M6 (France)
THE CONCEPT: An investigation into the mysterious circumstances surrounding the death of Princess Diana

On the twentieth anniversary of Princess Diana's death in a car crash in Paris, there is a spate of new factual series and specials that will chronicle her life or explore her untimely passing. In the latter category is *Diana: The Truth Behind Her Death* (WT), a 60-minute special for M6 in France.

The film claims to "unlock the answers to Diana's fate through a series of shocking revelations". It features "exclusive testimony from contributors and witnesses, including members of the investigation team and emergency services who were first to arrive on the scene of the crash in the Alma tunnel, some of whom have never spoken". The film also uses stunt teams to reconstruct key events to understand what happened.

The documentary's director, Manuel Laigre, says: "We left no stone unturned to get the bottom of this tragedy which has remained a mystery for two decades. The outcome of our documentary film will leave viewers stunned and outraged."

Banijay Rights has acquired the rights to the show, and the distributor's head of factual Emily Elisha says: "Twenty years later there are still many open theories and unanswered questions about what caused Princess Diana's death. This film sheds new light on this event that shook the world."



THE SHOW: *World's Most Evil Killers*
THE PRODUCER: Woodcut Media
THE DISTRIBUTOR: Keshet International
THE BROADCASTER: Pick TV (UK)
THE CONCEPT: Gripping true crime documentary series about terrifying and prolific killers

World's Most Evil Killers is a 20x46mins series that delves into the sordid minds of some of the most notorious murderers on the planet.

Retelling chilling tales using a combination of interviews, narration, archive and stylised reconstruction, the show explores murderers including Fred and Rose West, 'The Milwaukee Cannibal' Jeffrey Dahmer and Ed Gein – the so-called Clown Killer.

Each episode focuses on one killer and features first-hand accounts from lead detectives, journalists, relatives, and – in some cases – survivors.

Keren Shahar, COO of Keshet International and president of distribution, says: "International demand for true crime is still very strong and *World's Most Evil Killers* is riding the long wave of this trend.

"By telling the real life stories of some of the world's most prolific killers, it has the ability to resonate and appeal to a broad geographic and demographic audience."

The series was one of two shows – the other

being *Britain's Most Evil Killers* – that factual-focused UK indie Woodcut Media sold to Sky free-to-air channel Pick TV last year.

At the time, Pick director Stephen Ladlow pointed to the shows as suiting the network's 'Real Life Emergency' programming strand, adding they would headline Thursday nights.

So far, KI has sold the series to RTL for German-speaking Europe as part of a multi-year deal. "We have strong interest from other broadcasters with whom we are in negotiations," says Shahar.

"This is content with appeal for both linear and non-linear platforms as audiences demand their next fix."

Shahar sees 20 episodes as an advantage, claiming it gives broadcasters the quantity many need for their on-demand services.

"*World's Most Evil Killers* provides the volume that enables buyers to acquire a definitive collection to be binge-watched, which has become somewhat imperative for all platforms, as they scale up the number of episodes they make available for loyal viewers," she adds.

THE SHOW: *Korea – The Never Ending War*
THE PRODUCERS: ARK Media, WETA
THE DISTRIBUTOR: ZED
THE BROADCASTER: WETA (US)
THE CONCEPT: A look at the historic conflict between North and South Korea

French producer-distributor ZED is distributing *Korea – The Never Ending War*, a US\$1.6 million two-hour coproduction between US public broadcaster WETA and ARK Media.

Due to air in late 2018, the film will bring critical context to the current crisis on the Korean peninsula between the Communist North and democratised South. It will also present new evidence from recently opened archives in Russia, the US, China and South Korea that could change the history books.

The Korean War of 1950-1953 is a conflict that has never really ended, influencing international relations to this day. Despite this, and the horrors it has led to, it has been largely forgotten.

However, with historical material now available, including colour films and hundreds



of photographs, WETA's doc aims to challenge the knowledge gap.

John Maggio, director and writer for ARK, and whose credits has produced films for PBS's flagship factual series *Frontline*, is making the programme for Washington DC network WETA.

Manuel Catteau, president of ZED, says: "Being on the brink of a major nuclear conflict, Korea has become the most dangerous place on Earth. The series will reveal how we got here, because the current battle lines are the same as they were in 1953."



THE SHOW: *Elián*
THE PRODUCERS: Fine Point, Jigsaw Productions
THE DISTRIBUTOR: Content Media Corp
THE BROADCASTER: CNN (US)
THE CONCEPT: A famous US-Cuban immigration controversy combining a survival story with political intrigue

Elián is a powerful documentary about Elián González, who became embroiled in a US-Cuban immigration controversy and custody battle 18 years ago, at the age of five.

Featuring personal testimony, candid interviews and compelling news archive, the documentary presents a gripping account of Elián's remarkable survival after his mother

and ten others perished at sea, the custody battle between the boy's Cuban father and Miami-based relatives, and the momentous political fight that came to surround it.

Explaining its appeal to the international market, Jonathan Ford, executive VP of sales and distribution at Content Media Corp, says: "There is an argument to suggest

that the Al Gore-George W. Bush election campaign was influenced by the way the events surrounding Elián González were handled, as the political battle became a hot topic amongst the ex-Cuban population living in Florida. It was felt at the time that Al Gore had upset the Cuban population of Florida with his stance and thus lost the Florida vote."

Ford notes that the impact of the 2001 US election result and the idea the situation led the gradual thawing of US-Cuba relations means *Elián* is "a very relevant piece for the international market".

It is coproduced by Fine Point Films and Jigsaw Productions and was acquired by CNN Films, which is the exclusive US home and broadcast rights holder in Canada. CNN also has some international TV and mobile rights, with the balance of worldwide distribution rights held by Content.

Sales to date include the BBC in the UK, Discovery Networks in Latin America and DR in Denmark. "There has been a notable upswing in sales of our documentary features," says Ford.

THE SHOW: *Soundtracks – Songs That Defined History*
THE PRODUCERS: Seven Bucks Productions, Show Of Force
THE DISTRIBUTOR: FremantleMedia International
THE BROADCASTER: CNN (US)
THE CONCEPT: Series exploring music inextricably linked to momentous events in recent history

From the March on Washington to the LGBT riots at the Stonewall Inn, the moon landing to Hurricane Katrina, *Soundtracks – Songs That Defined History* explores the music that played an integral part in celebrating, criticising and amplifying these momentous events in mankind's collective memory.

Explaining the eight-part doc's appeal to buyers, Sam Harowitz, VP of scripted acquisitions and coproductions, global content at FremantleMedia International, says: "Music is the universal language that allows people to connect to one another and the subject at the heart of this series. It is the theme that makes this programme globally relevant."

"The series eloquently draws a line from music that we know to pivotal events in history



by using A-list talent including Sting, Bruce Springsteen, Randy Jackson and Patti Labelle, commercial music, and stunning archival footage."

In terms of where it will play best, Harowitz says: "Premium factual programming like *Soundtracks* has the potential to reach

audiences and demographics on a variety of platforms. We anticipate it will primarily appeal to pay TV before migrating to streaming and/or free to air public channels."

He adds that Fremantle-sold CNN docs such as *The Sixties*, *The Seventies*, *The Eighties* and *The Nineties* have shown 6-10 hours is a "sweet spot".



THE SHOW: *Munduruku – Fight to Defend the Heart of the Amazon*
THE PRODUCERS: Alchemy VR, Greenpeace, The Feelies
THE DISTRIBUTOR: Alchemy VR
THE CONCEPT: A sensory VR experience exploring a local tribe's attempts to save the Amazon

experience launched in Brazil in June and will feature at both this year's Sheffield Doc/Fest and Glastonbury Festival in June.

The 14-minute experience combines VR filming with an immersive VR pod experience from multisensory storytelling group The Feelies, which collected data by performing a sensory mapping of the Sawré Muybu area in Brazil, including taking scents from the forest. The data harnessed was used to create six bespoke perfumes, an infrasonic frequency track, humid atmospheres and a narrative of heat and wind.

John Sauven, executive director of Greenpeace UK, says: "The Mundurucu had already been resisting the destruction of their ancestral lands for decades when they asked Greenpeace to help communicate their struggle internationally."

"We have forty years of experience in using technology to show the public problems normally hidden from them, from whaling and toxic dumping at sea to drilling in the Arctic or logging in the Congo. For this project we're pushing that to a new level." **TBI**

Virtual reality studio Alchemy VR, Greenpeace and The Feelies are rolling out a pioneering VR collaboration *Munduruku – The Fight to*

Defend the Heart of the Amazon.

From VR director James Manisty and multisensory director Grace Boyle, the VR

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Military procedure

International broadcasters are desperate for American procedurals, and this year the Hollywood studios believe they've got the supply to satisfy demand. Jesse Whittcock reports from LA

SEAL Team

Major international networks have been demanding more procedurals from the US studios for years. The ratings stability the format offers is not matched on a consistent basis by the edgier serialised cable fare that has become a staple of schedules in recent times.

While some recent years haven't necessarily been rich pickings in terms of procedurals, it is right to acknowledge the number of new closed episode shows lined up for the 2017/18 broadcast season.

"We have an unparalleled record in edgy shows, but we are aware people need that event programming that gives someone a reason to tune in on a specific evening," says Sony Pictures Television (SPT) president of distribution Keith Le Goy. "As broadcasters fly in from around the world, we can say, 'we heard you', and that we did not forget these kinds of shows."

"We heard the message loud and clear," confirms Mark Endemano, senior VP and general manager of Disney Media Distribution (DMD) EMEA. "The free TV networks across Europe especially have had a strong demand for this type of programming."

Those who made the trip to Sony's Culver City studio found *SWAT*, which follows a group of elite police agents and stars Shemar Moore (*Criminal Minds*). "It's a 'supercop' show with a super cast and a super-evolved level of action," says Le Goy.

Disney was offering series such as *The Gospel of Kevin* ("a light comedy-drama procedural centering on a callous and self-serving man who is

visited by an angel that wants him save the world", Endemano says), and new Shonda Rhimes series *For the People*, which follows young New York lawyers (billed as "pure play procedural").

Twentieth Century Fox Television Distribution (TCFTVD) screened *The Resident*, which follows a trio of young doctors who are exposed to the harsh realities of life in the hospital by a brilliant but difficult senior. "It is terrific," says TCFTVD's senior VP and managing director of EMEA, David Smyth.

"It's just a wonderful, fast-paced and compelling medical procedural about the business of medicine and the choices doctors have to make in very stressful conditions," he adds.

NBCUniversal International Distribution & Networks president Belinda Menendez says NBC has taken a slightly different approach. "We have quite a focus on procedural shows with a serialised narrative – what we would call 'hybrid' shows," she says.

"We had this several years back with *House* and are extremely excited to have this with *The Brave* and *Reverie*. What is nice about these shows is that they can play well on both linear and SVOD platforms."

CBS Studios International (CBSSI) president and CEO Armando Nuñez claims that while other studios have focused on "super-serialised fare that's incredibly well done, but is difficult for linear players" in recent years, "The truth is CBS never went off that procedural track".

CBSSI has been pushing David Boreanaz-fronted procedural *SEAL Team*, which is one of a number of military- or elite operations-themed

series that was in LA this year. “This is a big budget, movie-in-looks drama,” he says.

“So much of television is cyclical,” Nuñez adds. “*SEAL Team* just provides great stories that can be told through the eyes of a military operative, and that doesn’t necessarily make it American-centric. Don’t forget *NCIS* has military roots.”

This season will also be remembered as one of vertical integration. Warner Bros. Worldwide Television Distribution president Jeffrey Schlesinger reels off stats showing that of the 34 shows the four top-rated networks (ABC, CBS, Fox and NBC) ordered, only nine went to non-affiliated networks. “NBC gave 100% of commissions to its affiliate studio; Fox, 100%. At ABC, it was 58% and CBS was 50%,” he says.

Warner has five new shows on those channels, however. Among the buzziest pre-market titles is *Young Sheldon*, which follows the Sheldon Cooper character from CBS sitcom *The Big Bang Theory*, while other notable comedies include Fox’s *LA to Vegas*, Disney’s *The Mayor*, CBS’s *9JKL*, NBCU’s *Will & Grace* reboot and Sony’s *Alex, Inc.*

From Warner’s shows for The CW, Schlesinger predicts networks and services with younger-skewing audiences will go for *Life Sentence*, which harks back to the period before superheroes when *Pretty Little Liars* drove the channel almost on its own.

“The SVOD buyers are now all over the place – *Riverdale* is a Netflix exclusive in many territories,” says Schlesinger. “That show is a bit narrow for ProSieben or ITV, but it is the sweet spot for SVOD. Those services should be interested in [*Pretty Little Liars* alum] Lucy Hale and *Life Sentence*.”

Menendez says crime shows that linear channels normally search out are, in fact, also interesting to subscription video services. “We see these

types of shows being valuable to SVOD services, often in the second window,” she adds.

Fox’s Smyth contends vertical integration isn’t necessarily a trend. “Fox has the top rated show on six networks in the US, including *Modern Family* on ABC, *This is Us* on NBC and *American Horror Story* on FX. It’s a demonstration that we make shows for everybody.”

He also acknowledges the number of orders is down across the board. “This year there are a lot of shows coming back,” he says. “There are some years where it is like that and some years where there are more new ones.”

Each studio chief independently makes the point that finding “the right buyer” for their new shows is now crucial – a deal with the wrong network can mean a series disappearing without a trace and losing back-end value. With CBS Corp. CEO Les Moonves recently saying advertising revenues had fallen below 50% for the first time, controlling rights and properly exploiting them is a more pressing concern than ever.

“This year we have more drama than comedy, but the main point is we have a very varied portfolio of content so we can work with buyers across the gamut,” says Disney’s Endemano. “We have also wanted to make sure the shows are with the right broadcasters and reach the right audiences.”

Ultimately, it’s a good time to be in the distribution business, even if the networks see an uncertain future ahead. “For networks fragmentation is a bad thing, but for distributors it is great, because there’s an interested buyer for almost all genres of programming,” says Warner Bros. sales chief Schlesinger.

SPT’s Le Goy says this all means there is one winner – the consumer. “It is a fantastic time to be a TV viewer,” he says. “People talk about the golden age of TV production, but it’s a golden age of TV viewing.”

INSIDE THE STUDIO: FOX

Twentieth Century Fox Television Distribution (TCFTVD)’s broadcast slate is entirely comprised of shows for its own network. “What matters is the quality and we have that in spades,” says David Smyth, senior VP and managing director of EMEA at TCFTVD.

Probably the most notable show is *The Gifted*, which is a Marvel Television series that has *Burn Notice* creator Matt Nix and Hollywood director Bryan Singer attached. *The X Men*-like show follows two ordinary parents, one of whom is a district attorney who prosecutes mutants, who are forced to go on the run with their children after they begin displaying incredible abilities.

Smyth says the family unit is a “compelling way into the Marvel Universe”, adding: “Matt Nix and Bryan Singer are known for being able to create amazing worlds, so to get them together gives you a clear sense of how this world will play out.”

Also on the dramatic front is *The Resident*, one of a number of medical procedurals coming out of the studios for the new season. Manish Dayal (*Halt and Catch Fire*) stars as a young, idealistic doctor who is exposed to the good and bad of medicine by a tough but brilliant senior resident, with every decision potentially soul-shattering.

Comedies come in the shape of Seth MacFarlane’s sci-fi comedy-drama *The Orville*, US airline spoof *LA to Vegas* and extraterrestrial buddy comedy *Ghosted*.

The Orville follows *South Park* creator MacFarlane as the new captain



of a star ship 400 years in the future. “It’s a love letter to shows like *Star Trek: The Next Generation* and *Buck Rogers*,” says Smyth.

LA to Vegas is an ensemble comedy about the crew of a California-Nevada shuttle that has Will Ferrell as an executive producing. *Modern Family*’s Steve Levitan directed the pilot, while Dylan McDermott (*The Practice*, *Stalker*) has, according to Smyth, a “wonderful star turn” as a Ron Burgandy-type pilot.

Ghosted, meanwhile, stars Adam Scott (*Parks and Recreation*) and Craig Robinson (*The American Office*) as a pair of unwitting heroes, who are whisked away from their mundane lives to work as supernatural investigators. “If you’re a fan of *Ghostbusters* or *Men in Black* you’ll want to see this,” says Smyth.

INSIDE THE STUDIO: SONY

Sony Pictures Television had a pair of new broadcast dramas and a comedy on offer for buyers in LA this year. Though the figure is lower than the Culver City studio's best years, the number should be seen in context of the high volume of vertical integration.

SPT president of distribution Keith Le Goy is upbeat about the chances of ABC comedy *Alex, Inc.*, David Shore medical drama *The Good Doctor* and CBS show *S.W.A.T.*

He recognises that there is a need for the broad style the three shows have at their core. "That's what we're doing with these shows," he says.

Alex, Inc. is Zack Braff's return to broadcast television, with the *Scrubs* star playing a father who launches his own company, attempting to live his dream and simultaneously balance the needs of his family.

"Zack Braff is a massive and hugely beloved international star," says Le Goy. "People have been waiting for his return, and here we go with *Alex, Inc.*"

The Good Doctor, meanwhile, also marks a return – this time of *House* creator David Shore to medical procedural programming. Instead of Hugh Laurie's curmudgeonly genius, the new season show stars Freddie Highmore (*Bates Motel*) as a medical savant and talented doctor who has autism.

"Like Hugh Laurie's *House*, Freddie Highmore's character has a very specific condition," says Le Goy. "Freddie's portrayal will give the condition a platform."

S.W.A.T., a coproduction with CBS Television Studios and Perfect Storm Entertainment, is inspired by a 2003 movie that was itself a reworking of the 1975 series of the same name, with ex-*Criminal Minds* star Shemar Moore starring as part of an elite police team.

"This is Shemar in exactly the role you want to see him in – action from minute one to minute 48."



The Good Doctor



The Gospel of Kevin

INSIDE THE STUDIO: DISNEY

After a relatively quiet year in the 2016/17 season, Disney Media Distribution (DMD) is restocked and ready to go this time around with series such as high-concept comedy-drama *The Gospel of Kevin*. "We are very happy to be back in full effect this year," says DMD's senior VP and general manager for EMEA, Mark Endemano.

Disney's pipeline of Marvel Universe series continues this year with *Marvel's Inhumans*, which is literally getting the biggest launch of any broadcast network series this year.

An innovative launch set up will see the first two, extended episodes of the show debuting on giant IMAX screens in the US before the episodes go out on the Alphabet network. "*Inhumans* will be like nothing we've ever seen before," says Endemano. "The scale and ambition is supported by the fact we're working with IMAX."

The series follows an alien royal family who are forced to flee to Hawaii after a military coup on their homeworld. Anson Mount plays the lead character, Black Bolt.

Elsewhere, ABC Studios' relationship with Shonda Rhimes has once again come to the fore, with the *Grey's Anatomy*, *Scandal* and *How to Get Away with Murder* creator behind two new series.

The first is legal drama *For the People*, which young, ambitious prosecutors in the Southern District of New York Federal Court work to win cases. "This is pure-play procedural," says Endemano. "You get a serialised arc around the young lawyers, but this is really a case-of-the-week, ripped-from-the-headlines format."

Like *For the People*, the second series is also for ABC. It is another spin-off of medical drama *Grey's Anatomy*, coming after *Private Practice*, which ran between 2007 and 2013, but is set in a Seattle fire station.

The series will launch as a backdoor pilot within the latest season of its progenitor. "*Grey's* has been such a hit for us that it is great to be able to offer more related content," says Endemano.

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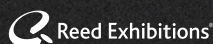


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INSIDE THE STUDIO: CBS



Wisdom of the Crowd

While it's true CBS has had bigger broadcast scripted slates in the past, distribution chief Armando Nuñez says this represents the US channel's settled schedule and numerous returning series.

"We don't have as many holes in the schedule as the other networks,"

says Nuñez, CEO and president of CBS Studios International. "Plus, we have stuff sitting on the sidelines such as *Elementary* that can slot in where there is weakness in the schedule."

One highlight of the new schedule is Mark Feuerstein's *9JKL*, which Nuñez compares to *Everybody Loves Raymond*.

"There's lots of physical humour," he adds, noting that the fact it follows *The Big Bang Theory* on Monday night shows CBS is placing a high degree of faith in the series.

Warner Bros has secured CBS's other comedy slots, but on the drama side CBSSI is offering Alan Cummings vehicle *Instinct*, David Boreanaz action series *SEAL Team* and *Wisdom of the Crowd*, which is based on an Israeli format.

Instinct sees Cummings, well known on the network from *The Good Wife*, playing a talented professor and former CIA operative who returns to duty to track down a serial killer. "Alan is very engaging," Nuñez says.

SEAL Team, which comes from writer Ben Cavell, is one a number of similar-themed dramas on the market this year, and is believed to be loosely based on the unit team killed Osama bin Laden in May 2011.

Wisdom of the Crowd, meanwhile, stars Jeremy Piven (*Entourage*, *Mr Selfridge*) as an innovative Silicon Valley tech innovator who creates a crowd-sourcing hub in order to find his daughter's killer, and then assembles a team of crime-fighting experts who can use the platform to fight all crimes. "This is bread and butter for CBS," says Nuñez.

INSIDE THE STUDIO: NBCUNIVERSAL

NBCUniversal International Distribution's entire slate comprises shows for the NBC network, and studio sales chief Belinda Menendez says buyers will find everything from 'hybrid' serial-cum-procedurals to anthology series.

For the latter, she points to *Law & Order True Crime – The Menendez Murders*. "Crime is hot right now, and no story is more compelling than this Dick Wolf drama," says Menendez, NBCUniversal International Distribution & Networks president.

On the procedural-hybrid front comes *The Brave*, which is one of two series Keshet Studios has landed on major broadcast networks in its first year of operation. The drama, about a Defence Intelligence Agency surveillance team, stars Anne Heche, and, according to Menendez, is "a true procedural with a hybrid component to keep viewers hooked".

She describes virtual reality-inspired drama *Reverie* as "a fresh take on the procedural with a modern twist around dreams". It comes from *Extant* creator Mickey Fisher, and stars Dennis Haysbert (*The Unit*).

NBCU's noisiest comedy is, of course, *Will and Grace*, which was taken straight-to-series after Universal Television convinced the network to reboot the groundbreaking LGBT-themed sitcom.

Menendez notes the new season, coming a decade after the last, will reunite Debra Messing, Eric McCormack, Megan Mullally and Sean Hayes. It also anchors the return of NBC's 'Must See TV' Thursday nights, which the network has used to sell sitcom-led evenings.

INSIDE THE STUDIO: WARNER BROS.

By adding *Young Sheldon*, *By the Book* and *Me, Myself and I* to CBS's primetime schedule, Warner Bros. now produces most of the network's key comedies, including behemoth *The Big Bang Theory*.

According to Jeffrey Schlesinger, Warner Bros. Worldwide Television Distribution chief, single cam *Young Sheldon* is "the most high profile series we have and exactly what the international buyers are craving".

By the Book is a classic US sitcom with a twist. Coming from Patrick Walsh, based on an A.J. Jacobs novel from 2007 and produced by *Big Bang* star Johnny Galecki, it follows a lapsed Catholic columnist who decides to live his life literally by the Bible.

"It is multi-cam, part-workplace comedy and part-relationship comedy," says Schlesinger. "It's great to see multi-cams still being produced because their repeatability is much better than single cam."

Me, Myself and I is an entirely original concept starring Bobby Moynihan, Jack Dylan Grazer and John Laroquette as the same man at different stages of his life. "It's in the vein of *This is Us*, but follows three periods of one man's life – in his early teens, his late 30s and his 60s"

Warner also has a new sitcom for ABC, *Splitting Up Together*, which counts Ellen DeGeneres amongst its executive production line-up.

The series follows Jenna Fischer (*The American Office*) and Oliver Hudson (*Rules of Engagement*) as a couple who find their relationship reignited by their divorce. Based on Mette Heeno's Danish series *Bedre Skilt End Aldrig*, it was one of the few format adaptations at this year's Screenings, along with Sony-sold medical procedural *The Good Doctor*. **TBI**

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SVOD changed film – is TV next?

It's the perennial question: what next? Maybe we are looking in the wrong place for the answer. Can we draw any lessons around financing and distributing content from feature films?

In broad terms, the theatrical world has become polarised between Hollywood's big budget glossy serial films and the smaller budget, 'independent' and often more 'cerebral' movies. Each appeals to different audiences, younger for the *WonderWomans* of this world, and older and more affluent for the *Manchester by the Seas* – the latter genre being an advertiser's dream.

I'm being purposefully liberal with my interpretation of 'small' using *Manchester by the Sea* as an example. Created by top Hollywood talent such as Matt Damon, it premiered at the 2016 Sundance Festival, where Amazon Studios purchased the US rights for US\$10 million, and watched it gross US\$73 million against a production budget of US\$8.5 million and win two Academy Awards.

This may have given Amazon Studios a taste for the customers that come with that success, and the respect that comes with excellence. The following Sundance, it was rumoured that Amazon made an open offer of up to US\$100,000 for the rights to every film featured at the festival. Niche to the power of

ten adds up to a lot of revenue when you trawl a few *Manchester by the Seas*. That's how to capture a market and give your platform that exclusive punch-through.

We're all now aware that Amazon Studios, with 65 million Prime members, and Netflix with 94 million subscribers, are also driving the TV drama bubble. Netflix's US\$6 billion projected spend is roughly US\$1 billion short of all the Hollywood studios put together.

So has the need for a traditional 'theatrical' release expired? SVOD allows your film to be seen in much greater volumes, and *The Crown* proved that in the TV world, you no longer need to launch drama on pubcasters or free commercial TV to win awards.

When old models are challenged there is, of course, push-back. At the Cannes Film Festival this year, both Amazon and Netflix had offerings in competition. Two in particular – Netflix pictures *The Meyerowitz Stories*, from Noah Baumbach, and Bong Joon Ho's fantasy epic *Okja* – were intended to go straight to streaming with no theatrical release in France. Following this disclosure, the organisers announced that in future, any film for consideration had to commit to being distributed in French cinemas.

Where does this leave TV? In the production world, hands are rubbing and pockets are

filling. Seemingly every week there's a new figure for the cost of drama per hour. Gone are the days when the US\$10 million per hour was fantasy.

While good in the short term for injecting resource into a jaded industry keen to move out of the reality TV trap, some say this means that in a few years from now, small screens may be just homogenous drama with a global appeal.

In the meantime, the likes of Amazon's *Oasis*, and Netflix's *Free Rein* are becoming the norm as the SVOD giants continue to commission one big budget drama after another.

The dice are loaded in the SVOD giants' favour against TV players. For them, where universal growth is just a flick of a switch, investment timelines are decades, not years; different from the time lines of the studios and, in turn, different from traditional broadcasters who are having to move fast and be nimble.

Take Sky, already a big investor in this genre, which recently announced a £195 million (US\$250 million) European drama copro deal with HBO. It went to extraordinary lengths to order a second season of *Carnival's Jamestown* way before season one was aired for fear of losing talent and the production team.

However, we need to look further. Buried in the sports section of a weekend broadsheet, an article caught my eye. 'Could football be sold direct to the viewer?', it asked.

How interesting would it be for UEFA to sell rights to the likes of Facebook or YouTube directly? They offer the events for free and recoup cash with advertising charged at a premium. The NFL does exactly this when streaming American football matches on Twitter.

So given Facebook's apparent move into long-form content, how long before your next drama commission comes from Facebook and its near two billion active users?

Now there's an audience. **TBI**

The dice are loaded in the SVOD giants' favour against TV players. For them, where universal growth is just a flick of a switch, investment timelines are decades, not years; different from the studios and, in turn, different from traditional broadcasters, who have to be fast and nimble

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